

GRANTS

GRANTS REVIEW AND TRACKING SYSTEM

Public User Guide

June 2014
Department of Water Resources
Project Services Office

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I. Introduction

Welcome to the Grants Review and Tracking System (GRANTS) for the California Department of Water Resources. Your organization can ensure efficient contract management and project oversight by using GRANTS. GRANTS is an interface that enables the project team to work together to manage contracts terms, project tasks, expenditures, and deliverables. DWR and Project Partners will track:

- Bond funds, cost-share from other state, federal, local, or other contributions that sum to the total project amount
- Milestones and project tasks
- Expenditures vs. percentage of work complete
- Deliverables
- Checklists of customizable items
- Invoice payment process
- Task level details

This guide provides screen by screen instructions for using GRANTS. If you need additional assistance using GRANTS, contact us at (888) 907-4267 or GRANTSadmin@water.ca.gov.

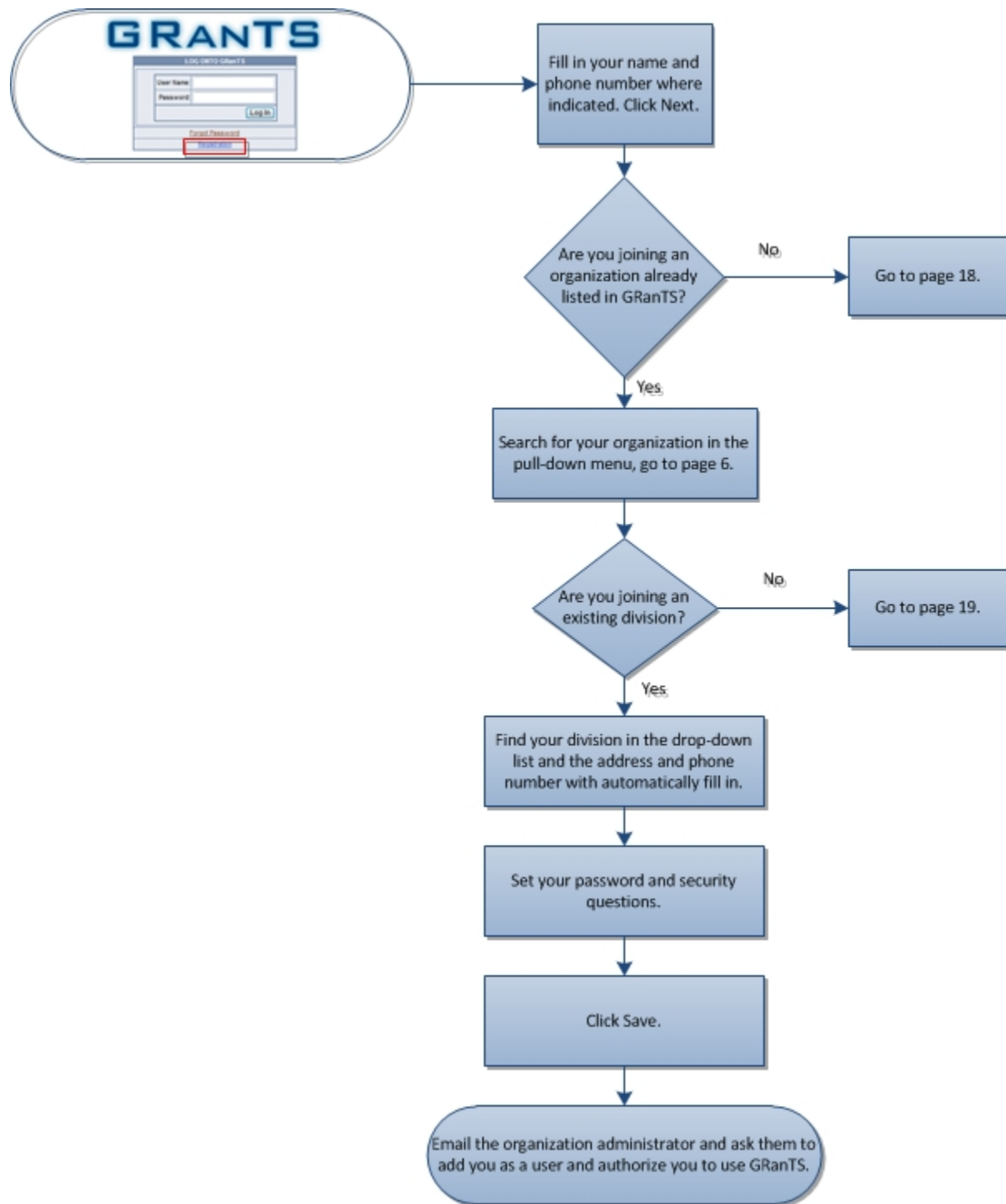
To use GRANTS you must create an account through the registration process ([Figure 1: Registering in GRANTS](#)).

Once you are registered you can use the system to prepare and submit proposals for an online solicitation, view contracts & projects, manage your organization's interaction with DWR, and prepare and submit invoice summaries and other activities that are related to the administration of Bond Funds through DWR.

Modules within GRANTS can be accessed using the **RED** tabs (the tab turns **BLUE** when you have selected a GRANTS module). The Sub-Modules are displayed as hyperlinks in the blue banner under the Module tabs. Within the Sub-Modules, the information presented may be further divided into Workbooks which are shown as gray tabs in the main display panel.



Figure 1: Registering in GRANTS

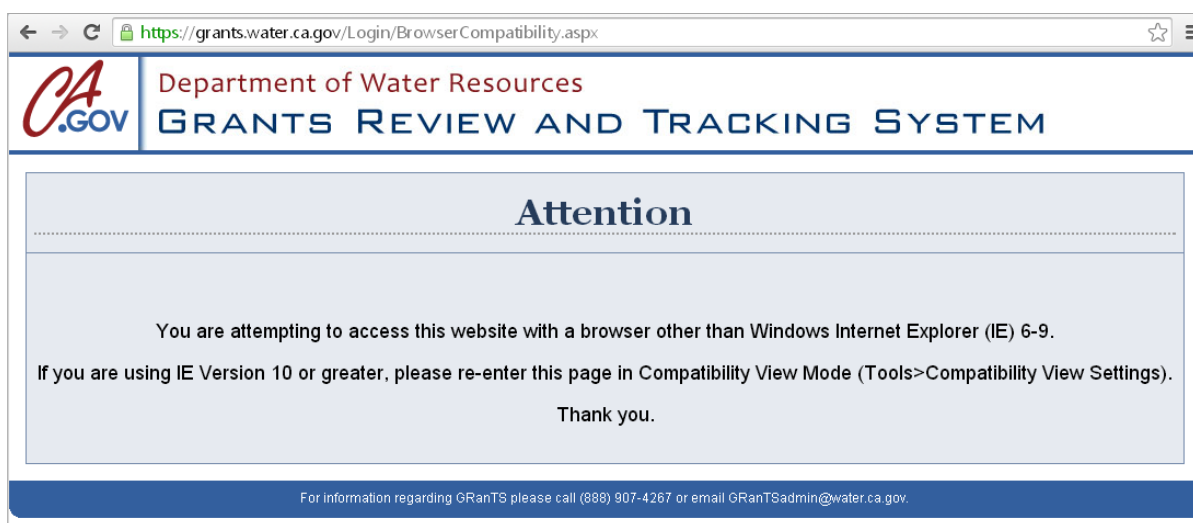


II. Getting Started

The launch page is located at: <http://www.water.ca.gov/grants/>.

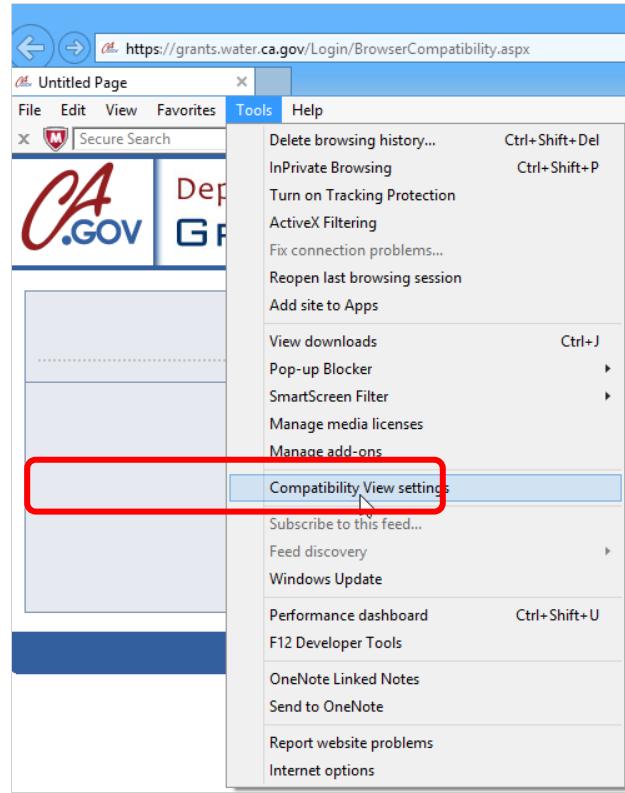
Browser Requirements: Internet Explorer Version 6 or later

- GRANTS works best with Internet Explorer Version 6-9.
- If you are using Internet Explorer and the version is greater than 9 or other Browsers, you will get the following message:

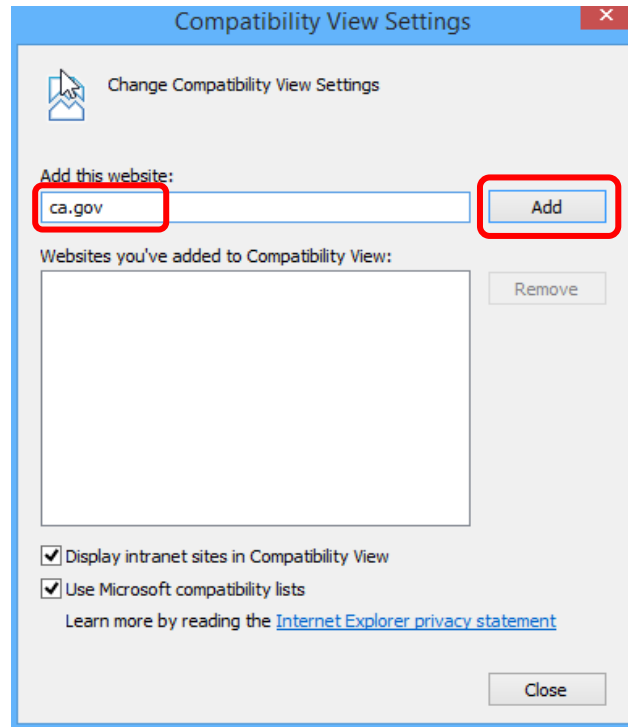


- If you are using Internet Explorer and the version is greater than 9, please turn on Compatibility View as shown on the next page:

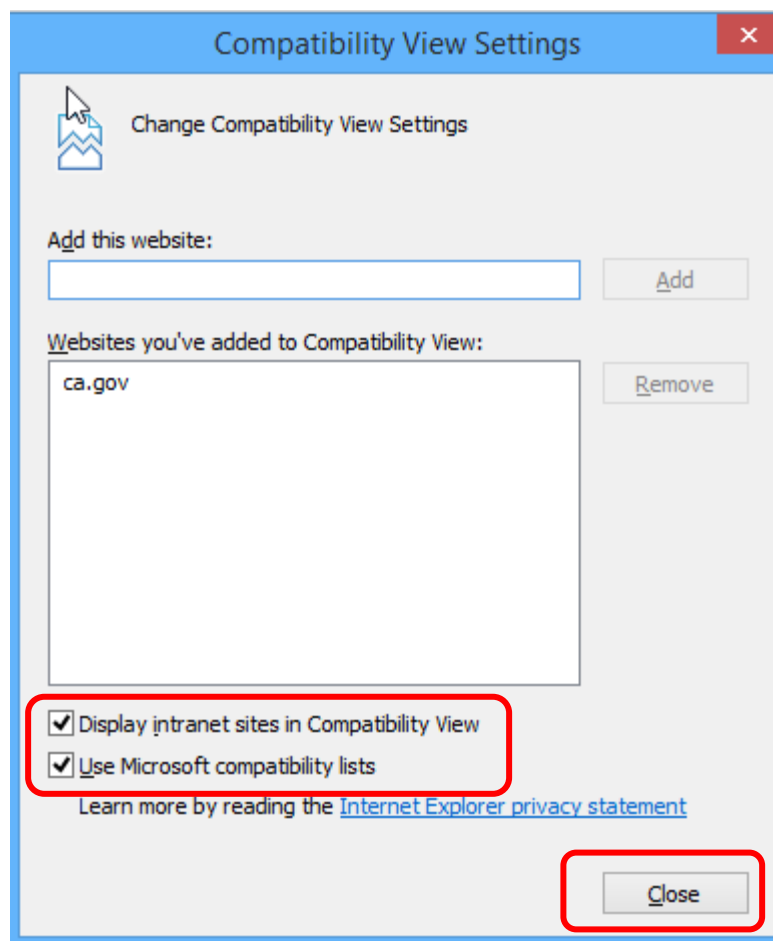
1. click **Tools** and then click **Compatibility View settings**



2. Under **Add this website**, enter **"ca.gov"** , and then click on **Add** button



3. Make sure all the check boxes are checked



4. Click on **Close** button.

The following graphic shows the GRANTS Home page:



The GRANTS Home Page has information we encourage you to read before you begin using GRANTS. Please review this guide, the [Quick Start Guide](#), [Frequently Asked Questions](#), and other training tools located at this site.

To begin, click on the **GRANTS Sign In** button on the bottom of the launch page.

The login screen is displayed so the user can enter his/her **User Name** and **Password** and click on the **Log In** button to log in:

Click on the **Registration** hyperlink located under the **Log In** button to enter in your information so that you can start using the GRANTS system.

The **User Registration** page is displayed:

On the **User Registration** page, the following three tabs are visible:

- Contact
- Organization
- Account

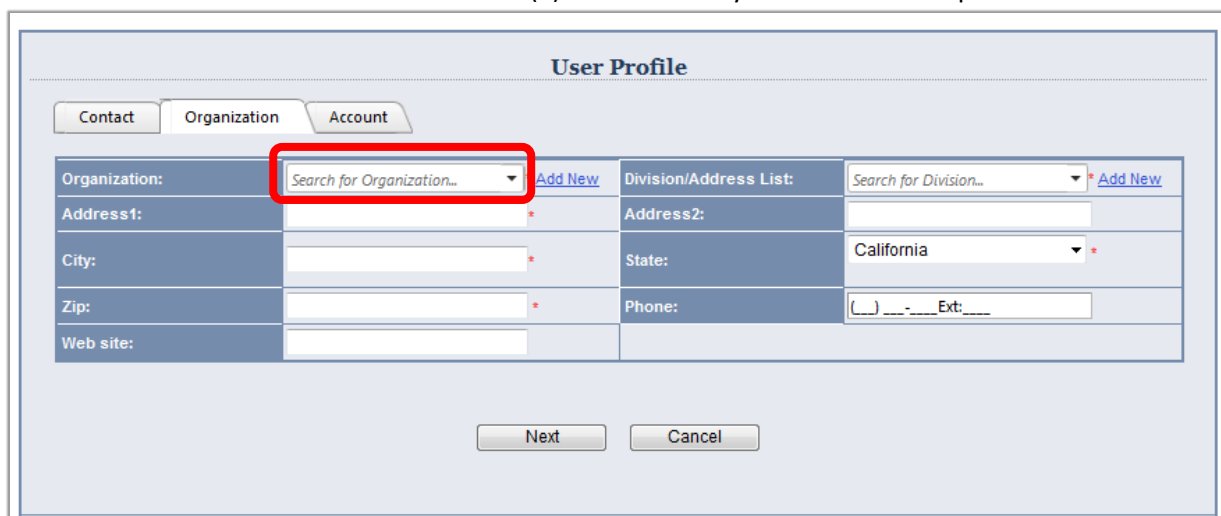
In the **Contact** Tab, fill out your **First** and **Last Name**, and **Phone (Office)** information, and then click on the **Next** button.



The screenshot shows the 'User Profile' form with the 'Contact' tab selected. The form contains fields for First Name, Middle Name, Last Name, Phone (Office), Phone (Direct), Phone (Mobile), and Fax. The 'Next' button is highlighted with a red rectangle.

User Profile			
Contact Organization Account			
First Name:	Phil *	Phone (Office):	(916) 878-6545Ext:3 *
Middle Name:		Phone (Direct):	() - - - Ext: - - -
Last Name:	Berman *	Phone (Mobile):	() - - -
		Fax:	() - - -

NOTE: The fields marked with a red asterisk (*) are mandatory and must be completed.



The screenshot shows the 'User Profile' form with the 'Organization' tab selected. The form contains fields for Organization, Address1, City, Zip, Web site, Division/Address List, Address2, State, and Phone. The 'Search for Organization...' dropdown menu is highlighted with a red rectangle.

User Profile			
Contact Organization Account			
Organization:	Search for Organization... * Add New	Division/Address List:	Search for Division... * Add New
Address1:		Address2:	
City:		State:	California *
Zip:		Phone:	() - - - Ext: - - -
Web site:			

The **Organization** tab will be displayed. For detailed information about searching, adding, or joining an organization, please refer to the [Organization Section](#) of this guide. You can either start typing the name of your organization in this field to narrow the list to show matching organization names, or you can select an existing **Organization** name from the dropdown field.

Select a Division from the **Division/Address List** dropdown field.



If your **Organization** or **Division** is not found, click on the **Add New** hyperlink located next to the **Organization** or **Division** dropdown menu. Please do not type the Division information directly on this screen. For additional details pertaining to adding a new **Organization** or **Division**, follow the following links: [Click here to add a new Organization](#) and [click here to add a new Division](#).

Values for the **Address, City, State, Zip, Phone,** and **Web site** fields for the selected Organization and Division will be auto-populated by the system once a Division has been selected from the dropdown menu.

User Profile

Selected Organization 'Agricultural Water Management Council' is Registered.

Organization: Agricultural Water Management Council [Add New](#)

Address1: Agricultural Water Management Council

City: Agro Industrial Management Irrigation and Soils Consultants

Zip: Alameda County FCD&WCD

Web site: Alameda County Resource Conservation District

Division/Address List: Select Division [Add New](#)

Address2:

State: California

Phone: () - - Ext: -

Next Cancel



If you share a Tax Identification Number (TIN) with a higher level organization (i.e., *Plumas County Water and Power Agency* and *Plumas, County of*) be sure to register the higher level organization (*Plumas, County of*) and create the lower level organization (*Plumas County Water and Power Agency*) as a division of that organization. Failure to do so can result in multiple divisions of a county or city trying to use the same TIN. The TIN must be unique to an organization.

Click on the **Next** button to go to the **Account** tab.

User Profile

Selected Organization 'Alameda Point Collaborative' is not Registered.

Organization: Alameda Point Collaborative [Add New](#)

Address1: 677 W. Ranger Ave

City: Alameda

Zip: 94501

Web site:

Division/Address List: Alameda Point Collaborative : [Add New](#)

Address2:

State: California

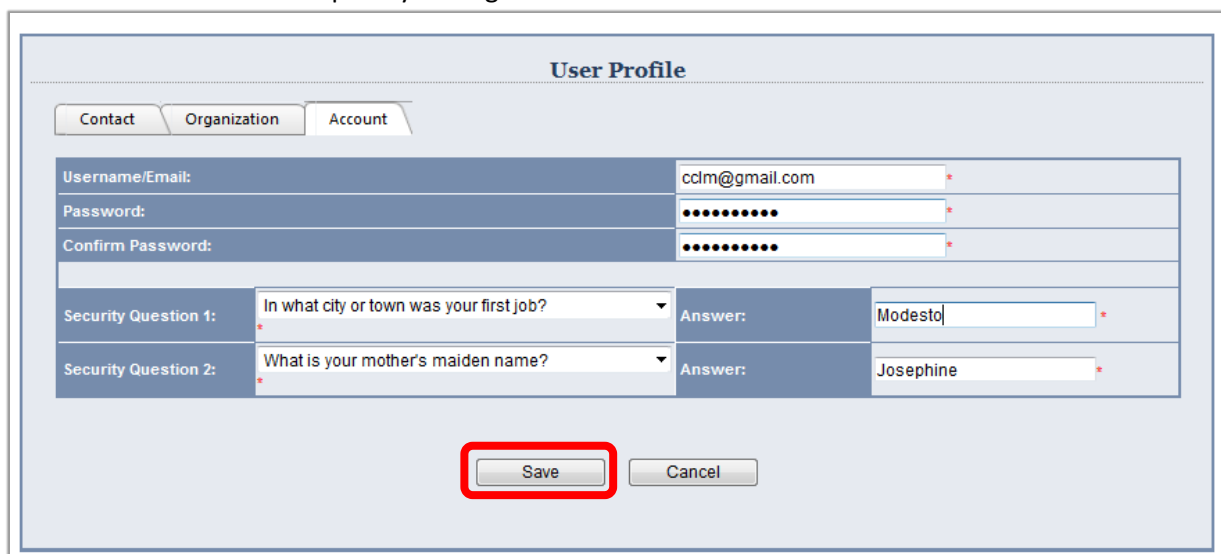
Phone: () - - Ext: -

Next Cancel

In the **Account** section, do the following:

- Specify a **Username** (your email address: JDoe@gmail.com)
- Specify a **Password** (must be at least 7 characters long and must contain at least three of the four groups: lowercase alpha, uppercase alpha, numeric, and special characters)
- Confirm the **Password**
- Select a Security Question from the **Security Question 1** dropdown selection
- Provide an **Answer** to the selected Security Question 1
- Select a Security Question from the **Security Question 2** dropdown selection
- Provide an **Answer** to the selected Security Question 2

Click on the **Save** button to complete your registration.

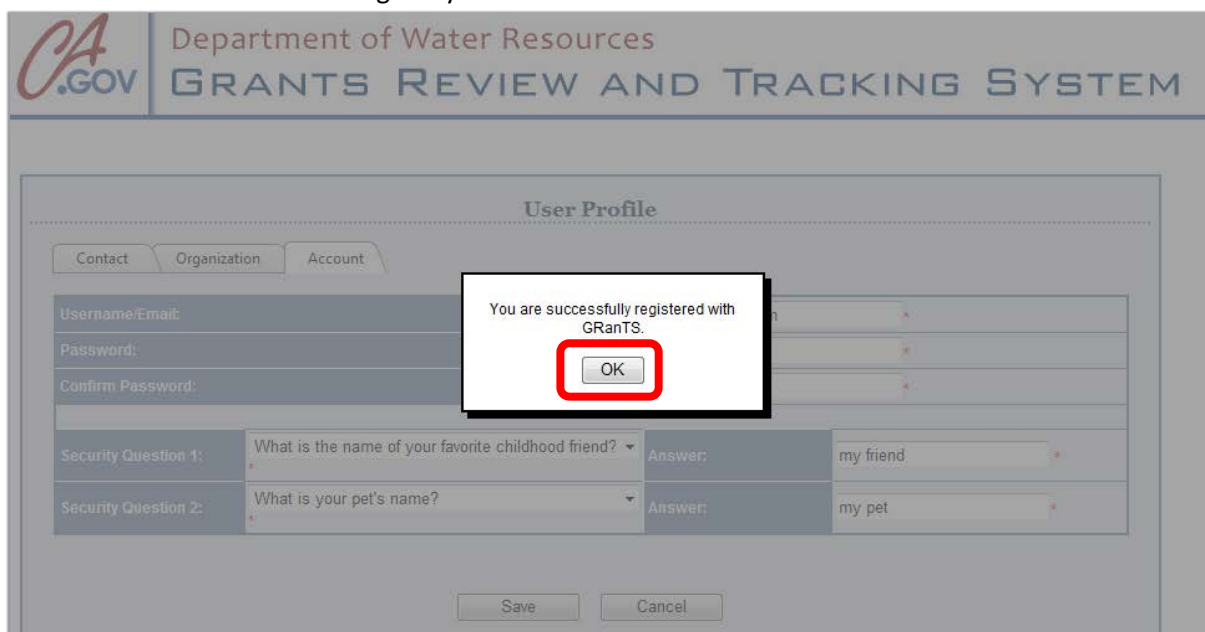


The screenshot shows the 'User Profile' registration form. It has three tabs: 'Contact', 'Organization', and 'Account'. The 'Account' tab is active. The form contains the following fields:

User Profile	
Username/Email:	ccdm@gmail.com *
Password:	***** *
Confirm Password:	***** *
Security Question 1:	In what city or town was your first job? *
Answer:	Modesto *
Security Question 2:	What is your mother's maiden name? *
Answer:	Josephine *

At the bottom, there are two buttons: 'Save' (highlighted with a red rectangle) and 'Cancel'.

The **User Registration Confirmation** popup window will show that: "You are successfully registered with GRANTS." Click on the **OK** button to go to your home screen.



The screenshot shows the 'User Profile' registration form with a confirmation popup window. The popup window has the text: "You are successfully registered with GRANTS." and an 'OK' button (highlighted with a red rectangle). The background form is dimmed and shows the following fields:

User Profile	
Username/Email:	ccdm@gmail.com *
Password:	***** *
Confirm Password:	***** *
Security Question 1:	What is the name of your favorite childhood friend? *
Answer:	my friend *
Security Question 2:	What is your pet's name? *
Answer:	my pet *

At the bottom, there are two buttons: 'Save' and 'Cancel'.



If the system reports that **Selected Email is already registered with GRANTS** when you click on the **Save** button, then you already have an account in GRANTS but it is inactive. Call (888) 907- 4267 or email GRANTSadmin@water.ca.gov if this occurs.

The screenshot shows the 'User Profile' form with tabs for 'Contact', 'Organization', and 'Account'. The 'Contact' tab is active. The form contains fields for Username/Email (kamele23@hotmail.com), Password, Confirm Password, Security Question 1 (In what city or town was your first job? Answer: Modesto), and Security Question 2 (What is your mother's maiden name? Answer: Loraine). At the bottom, there are 'Save' and 'Cancel' buttons. A red box highlights the error message: 'Selected Email is already registered with GRANTS.'

If the Organization selected (on the Organization tab) during User Registration is a new (unregistered) Organization, then the following additional message is displayed at the end of the User Registration process: **Your Organization is not registered in the GRANTS. Would you like to Register Organization now?**

The screenshot shows the 'User Profile' form with tabs for 'Contact', 'Organization', and 'Account'. The 'Organization' tab is active. The form contains fields for Username/Email (testemail@gmail.com), Password, Confirm Password, Security Question 1 (What was your childhood nickname? Answer: test1), and Security Question 2 (What is your spouse's mother's maiden name? Answer: test2). At the bottom, there are 'Save' and 'Cancel' buttons. A modal dialog box is displayed in the foreground with the text: 'Your Organization is not registered in the GRANTS. Would you like to Register Organization now?' and 'Yes' and 'No' buttons.

To register your organization, please follow the instructions in the [Organization Registration](#) section of this guide.



Only the Organization Administrator can register an Organization in GRANTS. Login to GRANTS and the Organization Administrator will be shown on your home page. Contact the Organization Administrator and ask the person to register the Organization. If no Organization Administrator is shown on your home page, contact GRANTSadmin@water.ca.gov to register the organization.

III. GRANTS Home Screen

Enter your e-mail and password established in the steps above.

The screenshot shows the GRANTS Home Screen. At the top left is the CA.GOV logo. To its right is the text "Department of Water Resources" and "GRANTS REVIEW AND TRACKING SYSTEM". Below this is a large blue "GRANTS" logo. Underneath the logo is a "GRANTS News" box with a red message: "BMS has changed its name to the Grants Review and Tracking System (GRANTS)". Below the news box is a "LOG ONTO GRANTS" login form with fields for "User Name:" and "Password:", a "Log In" button, and links for "Forgot Password" and "Registration".

You will be allowed into the system and your **Home Page** will be displayed:

The screenshot shows the GRANTS Home Page. At the top is a navigation bar with tabs: "Home", "PSPs", "Review", "Projects", and "Contracts". Below this is a "Home" tab and a "My Profile" link. On the right side of the page is a link for "Public User Guide (12MB)". The main content area is divided into two columns. The left column has two sections: "NEW SOLICITATIONS" with a message "2 New solicitations are available!" and "MY APPLICATIONS" with a table showing the status of applications. The right column has a section titled "YOUR ORGANIZATION'S ADMINISTRATOR IS:" followed by a table of administrator information. The table in the right column is circled in red.

Organization Name	Administrator	Email	Phone Number
RJOrg	Ramya	nranyaj@gmail.com	(111) 111-1111

At the bottom of the page is a footer with contact information: "For information regarding GRANTS please call (888) 907-4267 or email GRANTSadmin@water.ca.gov."

The GRANTS **Home** tab displays proposals solicitations (PSP/RFP) that are available to apply for through GRANTS, the name and contact information for all Organization Administrators for organizations of which you are a member, and the statuses of your applications.



To view projects, contracts, and proposals that belong to an organization, send an email or call the organization's administrator to ask for access. The Organization Administrator's contact information is listed on the right side of your home page as circled above.

IV. My Profile

To edit your personal profile, click the **My Profile** link in the blue selection bar.

Home | PSPs | Review | Projects | Contracts

Home | **My Profile**

[Public User Guide \(12MB\)](#)

NEW SOLICITATIONS

2 New solicitations are available!

MY APPLICATIONS

In Progress	20
Submitted	17
Awarded	7

YOUR ORGANIZATION'S ADMINISTRATOR IS:

Organization Name	Administrator	Email	Phone Number
RJOrg	Ramya	nramyaj@gmail.com	(111) 111-1111

For information regarding GRanTS please call (888) 907-4267 or email GRanTSadmin@water.ca.gov.

The system shows the **My Profile** screen. To edit or delete a phone number, click on the **Pencil** or **Trash** icon on the far right side of the screen. To add an additional phone number, click on the **Add New** hyperlink.

Home | PSPs | Review | Projects | Contracts

Home | My Profile

My Profile

Contact | Organization | Account

CONTACT DATA

First Name: Carol *

Middle Name:

Last Name: Mesman *

Save Cancel

PHONE NUMBERS

Phone Type	Area Code	Phone No	Extension No	
Office	916	651 - 7031		Add New
Mobile	916	999 - 9999	5841	
OfficeFax	916	999 - 9999	9	

For information regarding GRanTS please call (888) 907-4267 or email GRanTSadmin@water.ca.gov.

To become a member of another organization, navigate to the **Organization** workbook tab.

Home PSPs Review Projects Contracts

Home My Profile

My Profile

Contact **Organization** Account

CONTACT DATA

First Name:	Carol *
Middle Name:	
Last Name:	Mesman *
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

PHONE NUMBERS

Phone Type	Area Code	Phone No	Extension No	
Office	916	651 - 7031		
Mobile	916	999 - 9999	5841	
OfficeFax	916	999 - 9999	9	

[Add New>](#)

For information regarding GRanTS please call (888) 907-4267 or email GRanTSadmin@water.ca.gov.

From here, select the name of the organization you would like to join from the dropdown menu, select a division, and click on the **Save** button.

Home PSPs Review Projects Contracts

Home My Profile

My Profile

Contact Organization **Account**

ORGANIZATION DATA

Selected Organization 'RJOrg' is Registered.

Organization:	RJOrg * Add New	Division/Address List:	Flying Turkey : 5489 Hogwarts Cir * Add New
Address1:	5489 Hogwarts Circle *	Address2:	
City:	Rocklin *	State:	California *
Zip:	95784 *	Phone:	() - Ext:
Web site:			
<input type="button" value="Save"/> <input type="button" value="Cancel"/>			

For information regarding GRanTS please call (888) 907-4267 or email GRanTSadmin@water.ca.gov.

This will update your organization and division. . If you cannot find the organization or division, see the [Add New Organization](#) or [Add New Division](#) sections of this guide.

If you want to add a second organization to your profile without removing yourself from the organization you were initially a member of, please contact the Organization Administrator or GRanTS Admin at (888) 907-4267 or GRanTSadmin@water.ca.gov.

To edit your account information, including your password, select the **Account** workbook tab.

The screenshot shows a web application interface for editing a user profile. At the top, there are navigation tabs: Home, PSPs, Review, Projects, and Contracts. Below these, there is a sub-navigation bar with Home and My Profile. The 'My Profile' section is active, and the 'Account' tab is selected, highlighted with a red box. The 'ACCOUNT DATA' section contains several input fields: Username/Email (kamele23@hotmail.com), New Password, Confirm New Password, Security Question 1 (In what city or town were you born in?), Security Question 2 (What is your pet's name?), and their respective answers (modesto, xena). The 'Save' button is highlighted with a red box. At the bottom, there is a footer with contact information for GRanTS.

ACCOUNT DATA			
Username/Email:	kamele23@hotmail.com *		
New Password:			
Confirm New Password:			
Security Question 1:	In what city or town were you born in?	Answer:	modesto *
Security Question 2:	What is your pet's name?	Answer:	xena *
<div>Save Cancel</div>			

For information regarding GRanTS please call (888) 907-4267 or email GRanTSadmin@water.ca.gov.

Click on the **Save** button when you have finished making changes.

V. Forgotten Password

You have only 5 attempts to enter your password. If you enter a wrong password, “Your login attempt was not successful. Please try again” message will appear as shown below.

The screenshot shows the login interface for the Department of Water Resources GRANTS REVIEW AND TRACKING SYSTEM. The page features the CA.GOV logo and the system title. A central box titled "LOG ONTO GRanTS" contains a login form with fields for "User Name" (filled with "suresh.grants@gmail.co") and "Password". A red-bordered message box displays the error: "Your login attempt was not successful. Please try again." Below the password field is a "Log In" button. At the bottom of the login box are links for "Forgot Password" and "Registration". A footer bar provides contact information: "For information regarding GRanTS please call (888) 907-4267 or email GRanTSadmin@water.ca.gov."

If you are unable to correctly enter the password in five attempts, you will be locked out of the account for security purposes. Contact the Organization Administrator, or the GRANTS Admin at (888) 907-4267 or GRANTSadmin@water.ca.gov to unlock and reactivate your account.

This screenshot shows the same login interface as the previous one, but with a different error message. The "User Name" field still contains "suresh.grants@gmail.co". The red-bordered message box now displays: "Your account is locked. Please contact the System Admin." The "Log In" button and the "Forgot Password" and "Registration" links remain visible. The footer bar with contact information is also present.

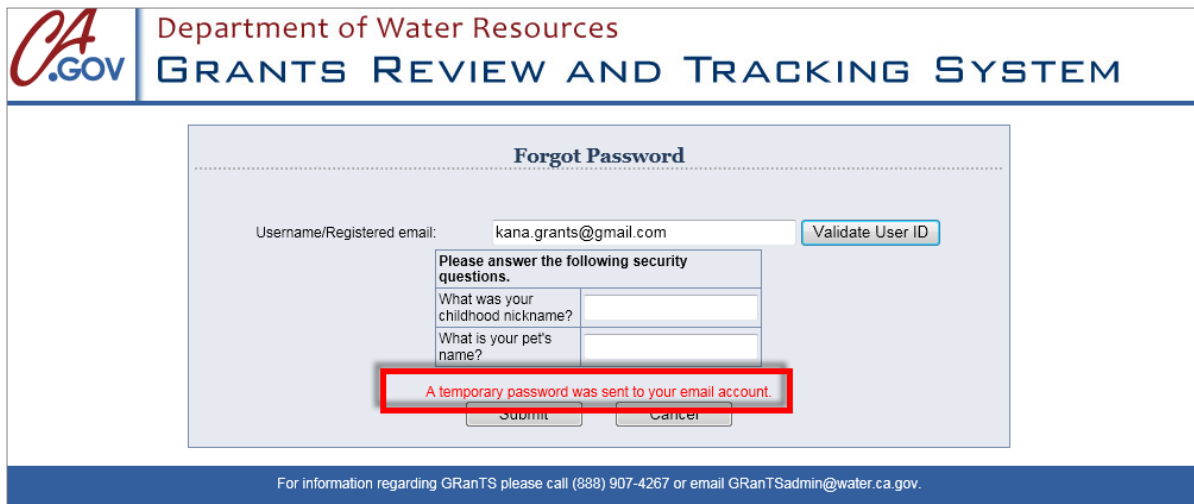
To reset a forgotten password, click on the **Forgot Password** link on the GRANTS Login page.

The **Forgot Password** page will be displayed. On the **Forgot Password** page, enter the Username/Registered email address of the Public User whose account password is to be reset. Click on the **Validate User ID** button.

The two security questions defined during the User Registration process and associated with the user account are displayed.

NOTE: You have only 3 attempts to reset your password. If you are unable to correctly answer the security questions in three attempts, you will be prevented from further attempts for security purposes. Contact the Organization Administrator, or the GRANTS Admin at (888) 907-4267 or GRANTSAdmin@water.ca.gov to reset your password.

After providing the correct answers to both Security Questions, click on the **Submit** button. The following confirmation message is displayed on the **Forgot Password** page: **A temporary password was sent to your email account.**



Department of Water Resources
GRANTS REVIEW AND TRACKING SYSTEM

Forgot Password

Username/Registered email:

Please answer the following security questions.

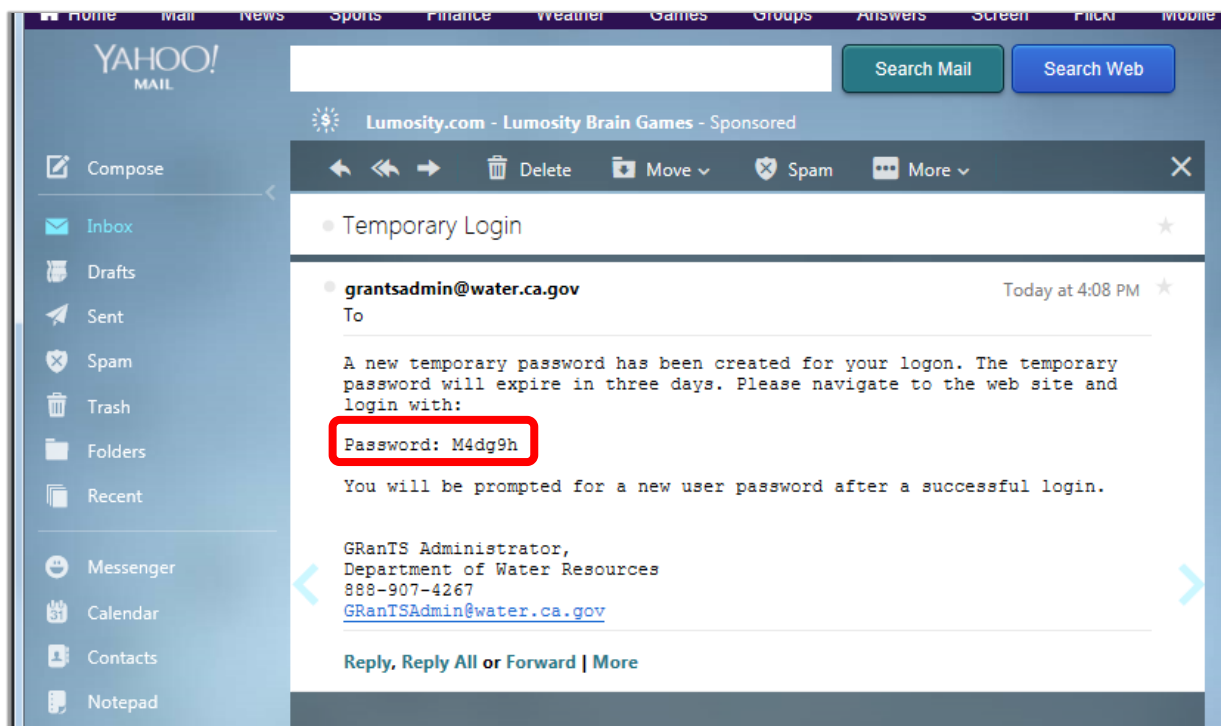
What was your childhood nickname?

What is your pet's name?

A temporary password was sent to your email account.

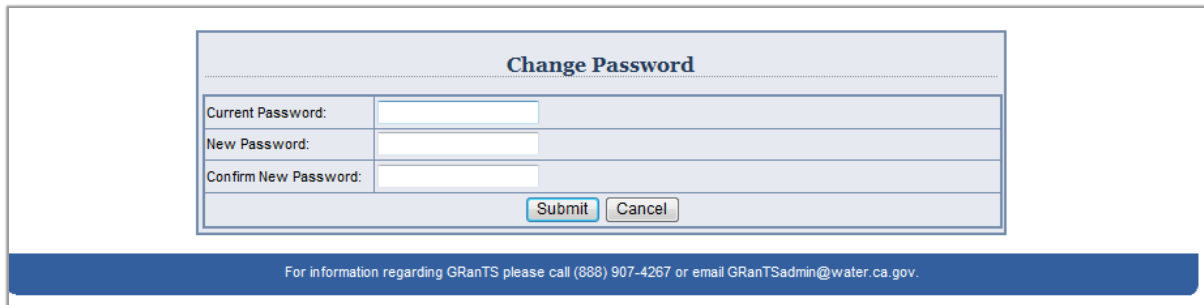
For information regarding GRANTS please call (888) 907-4267 or email GRANTSAdmin@water.ca.gov.

An email containing the temporary Password and instructions on how to reset the account Password is sent to the Public User's email address.



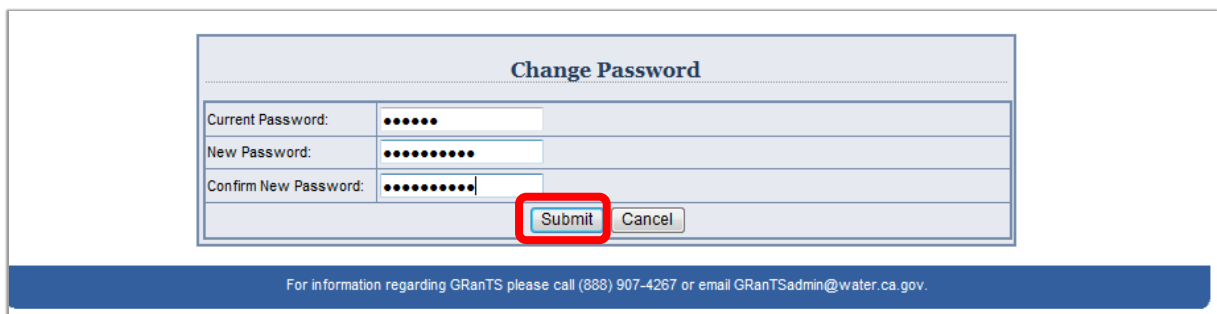
Log in again using the valid **Username** and the new (temporary) **Password** that was sent to the users email account.

The **Change Password** page will be displayed after validating the Username and (temporary) Password.



The screenshot shows a web form titled "Change Password". It contains three input fields: "Current Password:", "New Password:", and "Confirm New Password:". Below these fields are two buttons: "Submit" and "Cancel". At the bottom of the form, there is a blue footer bar with the text: "For information regarding GRanTS please call (888) 907-4267 or email GRanTSadmin@water.ca.gov."

Use the **Change Password** page to reset the account password.



This screenshot shows the same "Change Password" form, but the input fields are now filled with masked characters (dots). The "Submit" button is highlighted with a red rectangle. The footer bar at the bottom remains the same: "For information regarding GRanTS please call (888) 907-4267 or email GRanTSadmin@water.ca.gov."

After entering the needed information in the proper fields, click on the **Submit** button.

IV. Organizations

If you share a Tax Identification Number (TIN) with a higher level organization (ie., *Plumas County Water and Power Agency* and *Plumas, County of*) be sure to register the higher level organization (*Plumas, County of*) and create the lower level organization (*Plumas County Water and Power Agency*) as a division of that organization. Failure to do so can result in multiple divisions of a county or city trying to use the same TIN. The TIN must be unique to an organization.

A. Searching for an Organization

The screenshot shows a 'User Profile' form with three tabs: 'Contact', 'Organization', and 'Account'. The 'Organization' tab is active. A red box highlights the 'Organization:' dropdown menu, which contains the text 'Search for Organization...'. To the right of this dropdown is a blue 'Add New' hyperlink. Below the 'Organization:' field are fields for 'Address1:', 'City:', 'Zip:', and 'Web site:'. To the right of these are fields for 'Division/Address List:', 'Address2:', 'State:', and 'Phone:'. The 'Division/Address List:' dropdown also has a blue 'Add New' hyperlink. The 'State:' dropdown is currently set to 'California'. At the bottom of the form are 'Next' and 'Cancel' buttons.

It is important to search and find your organization if it has already been entered into GRANTS. There are several reasons your organization might already be entered and they include the following:

- Your organization had a contract with DWR previously
- Someone else from a different division or location entered the organization
- The naming convention differs from another entry, i.e.
 - City of Sacramento
 - Sacramento, City of
 - Sacramento Dept. of Parks and Rec.

Please search thoroughly for your organization before clicking on the **Add New** hyperlink. Your organization is the primary entity that will contract with DWR. Each sub-department or division should select the higher organization from the drop-down menu and either select their division or **Add a New Division** to that organization.

To search for an organization, the basic steps are:

1. Select an existing Organization name from the **Organization** dropdown field. You can start typing the name of your organization in this field to narrow the list to show matching organization names.
2. Select a Division from the **Division/Address List** dropdown field.

3. Values for the **Address, City, State, Zip, Phone**, and **Website** fields for the selected Organization and Division will be auto-populated by the system once a Division has been selected from the dropdown menu.

The screenshot shows the 'User Profile' form with the 'Organization' tab selected. The 'Organization' dropdown menu is open, displaying a list of organizations including '3.1.3 Test', '3.1.5.0Org_Name', '411', '44', 'AAFred', 'Acme Water Co.', 'Acme Water Company', 'Acquisition Division', 'Action Pajaro Valley', 'Adcon Telemetry', 'Admin Test Org Name 2', 'Admin Test Org Name 3', 'Admin Test Org Name Test', and 'Affordable Desalination'. The 'Add New' link is visible next to the dropdown. The 'Division/Address List' dropdown is also open, showing 'Search for Division...'. The 'Address1' field is populated with '3.1.3 Test', 'City' with '411', 'State' with 'California', and 'Phone' with '() - - - - Ext: - - - -'. The 'Next' and 'Cancel' buttons are at the bottom.

B. Creating a New Organization

To enter a new organization name (one that does not exist in GRANTS) follow these steps:



If you share a Tax Identification Number (TIN) with a higher level organization (i.e., *Plumas County Water and Power Agency and Plumas, County of*) be sure to register the higher level organization (*Plumas, County of*) and create the lower level organization (*Plumas County Water and Power Agency*) as a division of that organization. Failure to do so can result in multiple divisions of a county or city trying to use the same TIN. The TIN must be unique to an organization.

The screenshot shows the 'User Profile' form with the 'Organization' tab selected. The 'Add New' link next to the 'Organization' dropdown menu is highlighted with a red box. The 'Next' and 'Cancel' buttons are at the bottom.

Click the **Add New** hyperlink next to the **Organization** dropdown menu.

Add New Organization

Organization:	Los Angeles Water District *	Division:	City of Los Angeles *
Address1:	944 Whitley Avenue *	Address2:	
City:	Sacramento *	State:	California ▼ *
Zip:	93212 *	Web site:	

Enter the address and contact information. Click on the **Save** button to save the information you entered. You will then be returned to the **Organization** screen.

C. Adding a new Division

After searching for and finding your organization, select the drop-down arrow to choose your division and/or address location. If an entry in the **Division/Address** field is not found, it is necessary to add a new one.

Click on the **Add New** hyperlink:

User Profile

Selected Organization 'Affordable Desalination Collaboration' is Registered.

Organization:	Affordable Desalination Collz ▼ * Add New	Division/Address List:	Select Division ▼ * Add New
Address1:		Address2:	
City:		State:	California ▼ *
Zip:		Phone:	() - - - - Ext: - - -
Web site:			

Enter the new division name (i.e. Department of Public Works), address, city, state and phone information on the **Add New Division** panel.

Add New Division			
Organization Name:	Affordable Desalination Collaboration	Division Name:	Folsom Desalination Program *
Address1:	245 W. Palmer St *	Address2:	
City:	Folsom *	State:	California *
Zip:	95630 *	Phone:	() - - Ext: - -
Web site:			
		<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Click on the **Save** button to save the information you entered.

A confirmation screen will appear once the information has successfully saved.

Add New Division			
Organization Name:	Affordable Desalination Collaboration	Division Name:	Folsom Desalination Program *
Address1:	245 W. Palmer St *	Address2:	
City:	Folsom *	State:	California *
Zip:	95630 *	Phone:	() - - Ext: - -
Web site:			
		<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

For information regarding GRanTS please call (888) 907-4267 or email GRanTSadmin@water.ca.gov.

Folsom Desalination Program has been successfully added to Affordable Desalination Collaboration.

Click on the **OK** button and you will be returned to the original registration panel.

Now you will be able to find both your organization and your division populated in the drop-down menu.

Select the division that was just added from the dropdown menu to populate the address information and click on the **Save** button.

D. Registering an Organization

Organization Registration enables a user to register an organization in GRANTS by providing the Tax Identification Number (TIN) associated with that organization. This process is required for organizations applying for grant funds through DWR. If your organization is not registered, the system will prompt you to register at the end of the user registration process. Only the Organization Administrator may register your organization at a later date.

If you register your organization during the user registration process, click on the **Yes** button when asked if you would like to register your organization. You will be assigned as the Organization Administrator at this time.


The screenshot shows the 'User Profile' page with tabs for 'Contact', 'Organization', and 'Account'. The 'Organization' tab is active. The form contains fields for Username/Email (testemail@gmail.com), Password, Confirm Password, Security Question 1 (What was your childhood nickname? with answer test1), and Security Question 2 (What is your spouse's mother's maiden name? with answer test2). A dialog box is displayed in the center asking: 'Your Organization is not registered in the GRanTS. Would you like to Register Organization now?'. The 'Yes' button is highlighted with a red rectangle. At the bottom, there is a link 'For information regarding G...' and an email address 'TSAdmin@water.ca.gov'.

The Public User is redirected to the **Register Organization** page.

The screenshot shows the 'Register Organization' page. It has a table with the following fields: Organization Name (Alpaugh Joint Powers Authority), Organization Nick Name (empty), Tax ID (empty), and Administrator's Email (empty). There are 'Register' and 'Cancel' buttons at the bottom.

Enter the **Organization Nick Name** (not required), **Tax ID** (TIN) and **Administrator's Email**. Since you are the first user to register for your organization, you will be the Organization Administrator. Click the **Register** button, and then click **OK**.

The screenshot shows the 'Register Organization' page with the following filled fields: Organization Name (Alpaugh Joint Powers Authority), Organization Nick Name (AJPA), Tax ID (125874334), and Administrator's Email (venukanthan.kana@wa...). The 'Register' button is highlighted with a red rectangle.



Department of Water Resources
GRANTS REVIEW AND TRACKING SYSTEM

Register Organization

Organization Name:	TestkanaV Inc
Organization Nick Name:	
Tax ID:	
Administrator's Email:	

TestkanaV Inc' Organization is successfully registered.

OK

RegisterCancel

For information regarding GRanTS please call (888) 907-4267 or email GRanTSadmin@water.ca.gov.

VII. Organization Administrator

The GRANTS **Home** page for an Organization Administrator includes an additional tab for **Organization Admin**:

Home PSPs Projects Contracts **Organization Admin**

Home My Profile

[Public User Guide \(12MB\)](#)

NEW SOLICITATIONS

1 New solicitations are available!

MY APPLICATIONS

Application Status	Count
In Progress	23
Submitted	17
Awarded	7

YOU ARE THE ORGANIZATION ADMINISTRATOR FOR:

Organization Name	Organization Tax ID (FEIN)
RJOrg	123499999

YOUR ORGANIZATION'S ADMINISTRATOR IS:

Organization Name	Administrator	Email	Phone Number
RJOrg	Carol	kamele23@hotmail.com	(916) 651-7031
RJOrg	Devinder	ddhillon@ucdavis.edu	(916) 651-9243
RJOrg	Ramya	nrmyaj@gmail.com	(111) 111-1111

In addition to all of the functions that a general Public User can perform, the Organization Administrator can also:

- Change organization name or tax ID information
- Register an organization
- Add or remove public users to/from an organization
- Change permissions for authorized public users of an organization
- Unlock a public user's GRANTS account

The procedure and steps associated with each operation of Organization Administration are discussed in the following section.



A public user must ask the Organization Administrator for permission to access projects, contracts, and PSPs on behalf of the organization. Once registered in GRANTS under an organization, the user will send an email to or call the Organization's Administrator to ask permission for access.

A. Changing your Organization's name or Tax ID

Click on the **Organization Admin** tab on the **Home** page.

The screenshot shows the Home page with the following layout:

- Navigation Bar:** Home | PSPs | Projects | Contracts | **Organization Admin** (highlighted with a red box) | My Profile
- NEW SOLICITATIONS:** 1 New solicitations are available!
- YOU ARE THE ORGANIZATION ADMINISTRATOR FOR:**

Organization Name	Organization Tax ID (FEIN)
RJOrg	123499999
- MY APPLICATIONS:**

Category	Count
In Progress	23
Submitted	17
Awarded	7
- YOUR ORGANIZATION'S ADMINISTRATOR IS:**

Organization Name	Administrator	Email	Phone Number
RJOrg	Carol	kamele23@hotmail.com	(916) 651-7031
RJOrg	Devinder	ddhillon@ucdavis.edu	(916) 651-9243
RJOrg	Ramya	nramyaj@gmail.com	(111) 111-1111

The **User Mgmt** sub-menu item will be visible under the **Organization Admin** tab.

The screenshot shows the Organization Admin page with the following layout:

- Navigation Bar:** Home | PSPs | Projects | Contracts | **Organization Admin** | **User Mgmt** (highlighted with a red box)
- Organization Admin Section:**
 - Select Organization: Please Select (dropdown menu)
 - Organization Name:
 - Tax ID:
 - Buttons: Save, Edit, Cancel
- Users Section:**
 - Add New (link)

The **Organization Admin** page is displayed. Select an organization from the **Select Organization** dropdown menu.

The screenshot shows the Organization Admin page with the Select Organization dropdown menu open. The dropdown menu is highlighted with a red box and shows the following options:

- Please Select
- RJOrg

The Organization Name and Tax ID fields are empty, and the Save, Edit, and Cancel buttons are visible below the dropdown menu.

Details about the selected organization can be changed by selecting **Edit**. The entries in the **Organization Name** and **Tax ID** fields can be corrected from this screen. To register an organization at a later date, the Organization Admin enters and saves the Tax ID.

The screenshot shows the 'Organization Admin' page. At the top, there are tabs: Home, PSPs, Projects, Contracts, and Organization Admin. Below the tabs is a 'User Mgmt' section. The main content area is titled 'Organization Admin'. It contains a form with the following fields:

- Select Organization:** A dropdown menu with 'RJOrg' selected.
- Organization Name:** A text input field containing 'RJOrg'.
- Tax ID:** A text input field containing '123499999'.

Below the form are three buttons: 'Save', 'Edit' (highlighted with a red box), and 'Cancel'. Below the form is a 'Users' section with a table of users. The table has two columns: 'User ID' and 'Action'. The users listed are:

User ID	Action
amit.ra@touchpointinc.com	[Edit Icon]
venukanthan@hotmail.com	[Edit Icon]
ddhillon@ucdavis.edu	[Edit Icon]
namyai@gmail.com	[Edit Icon]
kameledion23@yahoo.com	[Edit Icon]

At the bottom of the table, there is a pagination control showing '1' and '1 of 2 Pages'.

B. Add or Remove Public Users from your Organization

Click on the **Organization Admin** tab on the **Home** page. On the **Organization Admin** page, select an organization from the **Select Organization** dropdown menu.

The screenshot shows the 'Organization Admin' page. At the top, there are tabs: Home, PSPs, Projects, Contracts, and Organization Admin. Below the tabs is a 'User Mgmt' section. The main content area is titled 'Organization Admin'. It contains a form with the following fields:

- Select Organization:** A dropdown menu with 'Please Select' selected.
- Organization Name:** A text input field containing 'RJOrg'.
- Tax ID:** A text input field.

Below the form are three buttons: 'Save', 'Edit', and 'Cancel'. Below the form is a 'Users' section with a table of users. The table has two columns: 'User ID' and 'Action'. The users listed are:

User ID	Action
amit.ra@touchpointinc.com	[Edit Icon]
venukanthan@hotmail.com	[Edit Icon]
ddhillon@ucdavis.edu	[Edit Icon]
namyai@gmail.com	[Edit Icon]
kameledion23@yahoo.com	[Edit Icon]

At the bottom of the table, there is a pagination control showing '1' and '1 of 2 Pages'.

Once an organization is selected, a list of public users registered with that organization will be displayed. To remove a user from your organization, click on the trash can icon to the right of their email address.

The screenshot shows the 'Organization Admin' page. At the top, there are navigation tabs: Home, PSPs, Projects, Contracts, and Organization Admin. Below these is a 'User Mgmt' section. The main content area is titled 'Organization Admin' and contains a form with the following fields:

- Select Organization: RJOrg (dropdown)
- Organization Name: RJOrg (text input)
- Tax ID: 123499999 (text input)

Below the form are buttons for Save, Edit, and Cancel. Under the 'Users' section, there is an 'Add New' link. A table lists the following users:

User ID	Action
amit.ra@touchpointinc.com	
venukanthan@hotmail.com	
ddhillon@ucdavis.edu	
namyal@gmail.com	
kameledion23@yahoo.com	

A red box highlights the trash can icon for the user 'namyal@gmail.com'. At the bottom of the table, there is a pagination control showing '1' and '1 of 2 Pages'.

To add a new user to your organization, click on the **Add New** hyperlink.

This screenshot is similar to the previous one, showing the 'Organization Admin' page. The 'Add New' link under the 'Users' section is highlighted with a red box. The table of users is the same as in the previous screenshot, but the 'Action' column for 'ddhillon@ucdavis.edu' now shows a trash can icon instead of a plus sign. The pagination control at the bottom still shows '1' and '1 of 2 Pages'.

The **Add/Modify User** screen will be displayed. Type the email address of the registered user you want to add to your organization in the **User ID** box.

The screenshot shows the 'Add/Modify User' form. The 'User ID' field is populated with 'testuser@grants.com'. Below it are three checkboxes: 'Lock/Unlock', 'Organization Admin', and 'Authorized User', all of which are currently unchecked. At the bottom of the form, there are two buttons: 'Save' and 'Cancel'. The 'Save' button is highlighted with a red rectangular border.

Click on the **Save** button to save the information entered.

If you wish to give them access to your organization's projects, contracts, etc., see section: [Authorize permissions for Public Users of your Organization](#).

Without additional permission, they will only see when PSPs become available and your contact information.

C. Authorize Permissions for Public Users of your Organization

Click on the hyperlinked email of a registered public user on the **Organization Admin** page.

The screenshot shows the 'Organization Admin' page. At the top, there are tabs for 'Home', 'PSPs', 'Projects', 'Contracts', and 'Organization Admin'. Below the tabs, there's a 'User Mgmt' section. The main content area is titled 'Organization Admin' and contains fields for 'Select Organization' (set to 'RJOrg'), 'Organization Name' (set to 'RJOrg'), and 'Tax ID' (set to '123499999'). Below these fields are 'Save', 'Edit', and 'Cancel' buttons. The 'Users' section is below, featuring a table with columns 'User ID' and 'Action'. The table lists several users, with the email 'kameledion23@yahoo.com' highlighted by a red rectangle. At the bottom of the table, there is a pagination control showing '1 of 2 Pages'.

User ID	Action
amit.ra@touchpointinc.com	
ddhillon@ucdavis.edu	
venukanthan@hotmail.com	
kameledion23@yahoo.com	
suresh.venukanthan@gmail.com	

On the **Add/Modify User** page, the Organization Administrator can grant and revoke permissions for different users within their organization:

Check the **Authorized User** checkbox to grant the selected public user access to your proposals, contracts, and projects.

Check the **Authorized User** and **Organization Admin** checkboxes to grant the selected public user access to the Organization Admin tools as well as the proposals, contracts, and projects.

The screenshot shows the 'Add/Modify User' form within the 'Organization Admin' tab. The form has a table with the following rows:

User ID	Lock/Unlock	Organization Admin	Authorized User
kameledion23@yahoo.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Below the table are 'Save' and 'Cancel' buttons. Red arrows point to the checkboxes for 'Organization Admin' and 'Authorized User'.

If a user has forgotten their password, the lock/unlock box will be checked. Uncheck the box to allow the user access to the system again.



Take caution do not to check the **LOCK** box for a public user. The lock-out function will disable the user's access to the entire GRANTS system. If you intend to remove a user from your organization you can uncheck the **Authorized User** box or delete the public user from your organization.

VIII. Preparing Proposal Solicitation Packages

Proposal Solicitation Packages (PSPs) can be released to the public through the GRANTS. PSPs can also be called RFPs (Requests for Proposals). The online application process enables DWR to capture electronic proposal data and review these proposals online.

On the **PSPs** tab, the following three submenus will be visible:

- All PSPs
- My Proposals
- My Communications

The screenshot shows the 'All PSPs' submenu. At the top, there is a navigation bar with tabs: Home, PSPs, Projects, Contracts, and Organization Admin. Below this, a sub-menu bar contains 'All PSPs', 'My Proposals', and 'My Communications'. The main content area is divided into two sections: 'Active PSPs' and 'Archived PSPs'. The 'Active PSPs' section contains a table with the following data:

Program Name	PSP Name	Released On	Due Date	Action	Attachments
Desalination Grant Program	Water Desalination PSP	11/18/2013	11/28/2013 5:00 PM	Start Proposal	No Attachments

The 'Archived PSPs' section contains a search form with the following fields:

Archived PSP Name:

Select Fiscal Year:

The page also lists the **Active PSPs** and **Archived PSPs**.

This screenshot is identical to the one above, but with red boxes highlighting the 'Active PSPs' and 'Archived PSPs' section headers.

On the page listing the active and archived PSPs, click on the **Start Proposal** hyperlink for the **PSP Name** to start an application.

The screenshot displays a web application interface for managing Proposal Solicitation Packages (PSPs). At the top, there is a navigation bar with tabs: Home, PSPs (selected), Projects, Contracts, and Organization Admin. Below this, a sub-navigation bar shows links: All PSPs, My Proposals, and My Communications. The main content area is divided into two sections: 'Active PSPs' and 'Archived PSPs'.

Active PSPs Section:

Program Name	PSP Name	Released On	Due Date	Action	Attachments
Desalination Grant Program	Water Desalination PSP	11/18/2013	11/28/2013 5:00 PM	Start Proposal	No Attachments

The 'Start Proposal' link in the Action column is highlighted with a red rectangle.

Archived PSPs Section:

This section contains a search form with the following fields:

- Archived PSP Name:** A text input field.
- Select Fiscal Year:** A dropdown menu with the text 'Select the Year'.
- Search:** A button to execute the search.

A. Starting a Proposal

Department of Water Resources has many programs that administer Proposal Solicitation Packages. In order to find specific information about the questions in the PSP, navigate to [DWR Program Funding Website Links](#). All of the information in each application process is explained in the Program Guidelines on the website for that program.

The proposal form will look similar to this:

Home	PSPs	Projects	Contracts	Organization Admin
All PSPs My Proposals My Communications				
Applicant Info	Projects	General Information and Attachments	Habitat Creation and Enhancement	Water Quality
				Research
				Adaptive Management
Full View				
Applicant Information				
APPLICANT INFORMATION				
Organization Name	Please Select *			
Tax ID				
Point Of Contact*	<input type="radio"/> Existing Registered Users <input type="radio"/> Add New User			
Point Of Contact Position Title*				
Proposal Name	* Maximum Character Limit: 150			
Proposal Objective	* Maximum Character Limit: 2000			
BUDGET				
Other Contribution				
Local Contribution				
Federal Contribution				
Inkind Contribution				
Amount Requested	*			
Total Project Cost	*			
GEOGRAPHIC INFORMATION				
Latitude *	DD(+/-)	MM 0	SS 0	
Longitude *	DD(+/-)	MM 0	SS 0	
Longitude/Latitude Clarification	Character Limit: 250		Maximum	
Location	Character Limit: 100		Maximum	
County	Los Angeles Madera Marin Mariposa			*
Ground Water Basin Help	Acton Valley Adobe Lake Valley Alexander Valley-Alexander Alexander Valley-Cloverdale			
Hydrologic Region Help	Central Coast Colorado River North Coast North Lahontan			
Watershed Help	Character Limit: 250		Maximum	
LEGISLATIVE INFORMATION				
Assembly District Help	10th Assembly District 11th Assembly District 12th Assembly District 13th Assembly District			*
Senate District Help	10th Senate District 11th Senate District 12th Senate District 13th Senate District			*
US Congressional District Help	District 1 (CA) District 10 (CA) District 11 (CA) District 12 (CA)			*
<div>Save</div> <div>Back</div> <div>Submit</div>				



Click on the **Save** button after entering information on each page. Click on the other sections to navigate to them and enter details.



If you receive an error on the Applicant Information page noting that you are not authorized to create a PSP, double check that your organization has been registered and that your account has been authorized by your Organization Administrator. Instructions for these steps can be found in the Authorize a User and Organization Registration sections of this guide.

B. Uploading Proposal Attachments

The following instructions will help you upload attachments to a proposal in GRANTS. Once the required fields of the Applicant Info tab are filled out, you can click on the Application Attachments tab to navigate to the page where you can go to upload necessary attachments to your proposal.

Home PSPs Projects Contracts Organization Admin

All PSPs My Proposals My Communications

Applicant Info Projects Eligibility Questions **Application Attachments**

Full View

Applicant Information

Organization Name	RJOrg *		
Tax ID	123499999		
Point Of Contact *	<input checked="" type="radio"/> Existing Registered Users <input type="radio"/> Add New User Ramya J *		
Division/Address List:	IT		
Address1:	1212	Address2:	
City:	Atlanta	State:	GA
Zip:	95610		
First Name:	Ramya	Last Name:	J
Title:		Phone (Direct):	(916) 2731111
Email:	nramyaj@gmail.com		
Proposal Name	Test * Maximum Character Limit: 150		
Proposal Objective	Test * Maximum Character Limit: 2000		

Click on the **Select** button to select which file you wish to upload. To upload more than one file, click the **Add** button and another upload slot will appear. There is a maximum of 5 upload slots per question.

Home PSPs Projects Contracts Organization Admin

All PSPs My Proposals My Communications

Applicant Info Projects Eligibility Questions Application Attachments

Full View

Attach.#01. Upload Attachment #01 here with file name as "Desal_Att01_Signature"

(Upload Limit: 1 MB each). File Name Limit: 50 Characters. Last Uploaded Attachments :

Select ☒ Remove

Add

To delete one or more uploaded files, check the 'Delete' check-box(s) next to the file name(s) and click Save

Attach.#02. Upload Attachment #02 here with file name as "Desal_Att#02_Authorization"

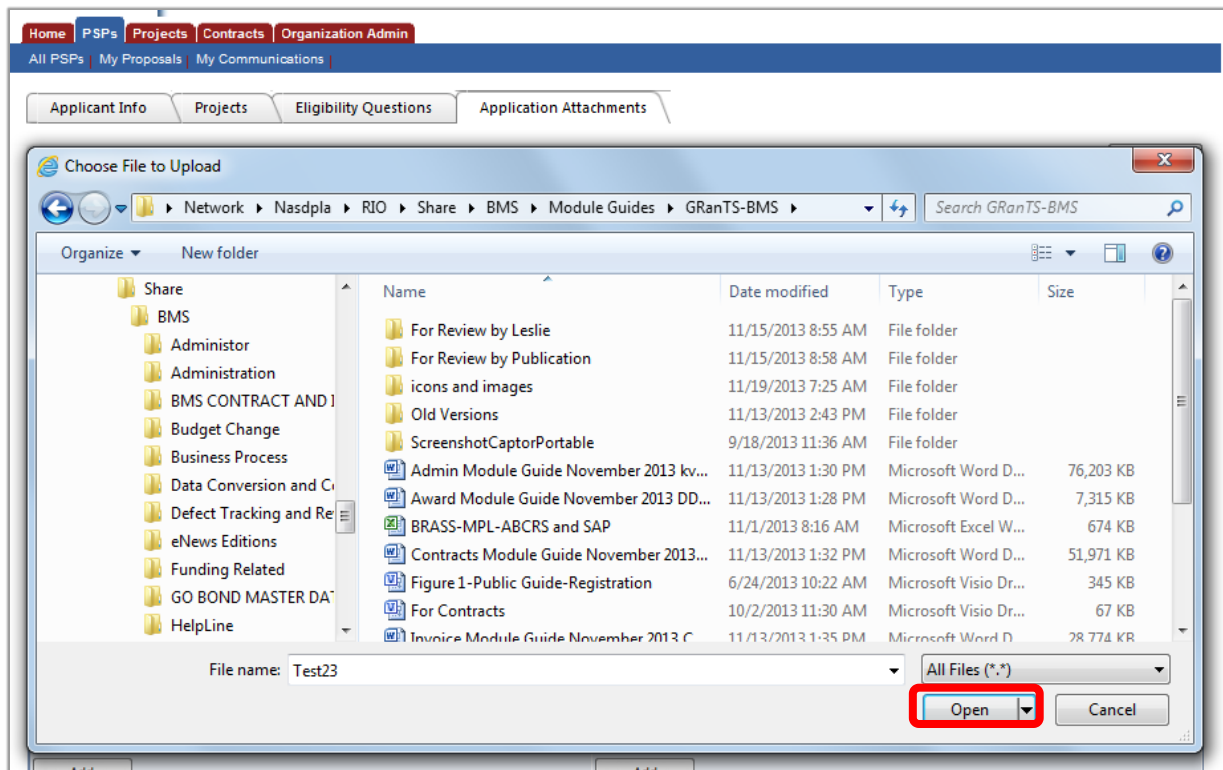
(Upload Limit: 1 MB each). File Name Limit: 50 Characters. Last Uploaded Attachments :

Select ☒ Remove

Add

To delete one or more uploaded files, check the 'Delete' check-box(s) next to the file name(s) and click Save

Browse through your computer for the file you want to upload. Select the file (restricted to one file per upload slot) and click on the **Open** button.



Repeat steps 1-3 for the all the attachments you wish to upload to the displayed page.

The screenshot shows two upload slots, Attach.#19 and Attach.#20. Each slot has a text input field for the file name, a file selection button, and a remove button. Below each slot is an 'Add' button. At the bottom of the form, there are 'Save', 'Back', and 'Submit' buttons. The 'Save' button is highlighted with a red rectangle. A footer bar contains contact information: 'For information regarding GRANTS please call (888) 907-4267 or email GRANTSadmin@water.ca.gov.'

Scroll to the bottom of the page and click on the **Save** button. Wait for the GRANTS to confirm the save.



Uploading large amounts of data online may take some time. Be sure to wait for confirmation before performing any other actions in GRANTS.

You can navigate to **My Proposals** under the **PSP** tab and select the **Attachments** link to view all of the attachments that have been uploaded for a given proposal.

My Proposals

Proposal Title	PSP Name	Organization Name	Due Date	Last Updated By	Last Updated On	Status	Attachments	Action
Water Proposal for Water PSP	Water PSP	RJOrg	03/31/2011	rjaya@gmail.com	03/30/2011	Submitte	Attachments	Submit
Suresh Test Proposal 4	Review Limitation - Tech & Consensus	RJOrg	01/31/2013	kvenukan	06/10/2013	Draft	Attachments	Submit
Test Proposal Email Notification	Test2014	RJOrg	06/27/2013	suresh.venukanthan@gmail.com	06/27/2013	Submitte	Attachments	Submit
Test Proposal - Suresh	BDO P84 Group II Projects	RJOrg	06/29/2013	suresh.venukanthan@gmail.com	06/28/2013	Draft	Attachments	Submit
sqsq	Test sprint 2 PSP	RJOrg	07/25/2013	suresh.venukanthan@gmail.com	06/28/2013	Draft	Attachments	Submit

1 1 of 10 Pages >>

My Archived Proposals

Proposal Title Select Organization Search for Organization...

For information regarding GRANTS please call (888) 907-4267 or email GRANTSadmin@water.ca.gov.

This shows you a full list of your proposal attachments from all sections of the application. We recommend you open the attached files to ensure they are the correct version if you have uploaded revisions several times.

Attachments

Proposal Title:

File Name	File Desc	Author
BMSTest.txt	Attachment 15.	
BMSTest.txt	Attachment 14. (cont)	
BMSTest.txt	Attachment 14.	
BMSTest.txt	Attachment 15. (cont)	

For information regarding GRANTS please call (888) 907-4267 or email GRANTSadmin@water.ca.gov.

C. Submitting Proposals

A proposal can be submitted any number of times until the deadline for the PSP. If you submit a proposal and later wish to make changes to the proposal simply open the proposal, make the changes, and click on the **Submit** button again. Clicking on the **Submit** button on one section submits all sections of the proposal.

LEGISLATIVE INFORMATION

Assembly District [Help](#)

Senate District [Help](#)

US Congressional District [Help](#)

10th Assembly District
11th Assembly District
12th Assembly District
13th Assembly District

10th Senate District
11th Senate District
12th Senate District
13th Senate District

District 1 (CA)
District 10 (CA)
District 11 (CA)
District 12 (CA)

Save Back **Submit**

For information regarding GRanTS please call (888) 907-4267 or email GRanTSadmin@water.ca.gov.

Your proposals will be saved under the **My Proposals** submenu item under the **PSP** tab.

Home **PSPs** Projects Contracts Organization Admin

All PSPs **My Proposals** My Communications

My Proposals

Proposal Title	PSP Name	Organization Name	Due Date	Last Updated By	Last Updated On	Status	Attachments	Action
Test 2012	Agriculture	RJOrg	04/13/2011	ddhillon	02/01/2013	Awarded	Attachments	Submit
Test 20121	Agriculture	RJOrg	04/13/2011	ddhillon	02/01/2013	Awarded	Attachments	Submit
Test Name Change	Leslies2012forNewTabs	RJOrg	09/30/2013	ddhillon@ucdavis.edu	08/28/2013	Submitted	Attachments	Submit
Test	Leslies2012forNewTabs	RJOrg	09/30/2013	devinderdhillon23@gmail.com	04/22/2013	Draft	Attachments	Submit
Why I have to change the name?	Leslies2012forNewTabs	RJOrg	09/30/2013	apurv.kis@gmail.com	08/02/2013	Submitted	Attachments	Submit

1 of 10 Pages >>

My Archived Proposals

Proposal Title Select Organization Search for Organization... Search

For information regarding GRanTS please call (888) 907-4267 or email GRanTSadmin@water.ca.gov.

IX. Viewing Contracts

Click on the **Contracts** tab on the **Home** page.

The screenshot shows the Home page of the GRANTS system. The navigation bar at the top has tabs for Home, PSPs, Projects, **Contracts** (highlighted with a red box), and Organization Admin. Below the navigation bar, there are several sections:

- NEW SOLICITATIONS**: A box indicating "1 New solicitations are available!"
- MY APPLICATIONS**: A table showing the status of applications:

Status	Count
In Progress	24
Submitted	17
Awarded	7
- YOU ARE THE ORGANIZATION ADMINISTRATOR FOR:** A table showing the organization's details:

Organization Name	Organization Tax ID (FEIN)
RJOrg	123499999
- YOUR ORGANIZATION'S ADMINISTRATOR IS:** A table showing the administrators:

Organization Name	Administrator	Email	Phone Number
RJOrg	Carol	kamele23@hotmail.com	(916) 651-7031
RJOrg	Devinder	ddhillon@ucdavis.edu	(916) 651-9243

At the bottom, there is a footer with contact information: "For information regarding GRANTS please call (888) 907-4267 or email GRANTSadmin@water.ca.gov."

The **My Contracts** page will be displayed showing all of the Contracts that you have been assigned to as a part of the contract team.

The screenshot shows the "My Contract List" page. The navigation bar at the top has tabs for Home, PSPs, Projects, **Contracts** (highlighted with a red box), and Organization Admin. Below the navigation bar, there is a section titled "My Contract List" with a sub-header "Export Data".

There are two dropdown menus: "Select Program:" (set to "(All Programs)") and "Select Year:" (set to "(AllYears)"). Below these, there is a checkbox labeled "View All Contracts" which is checked. A red box highlights the "Filter" button next to it.

Below the filter section, there is a table with the following columns: Program Name, Fiscal Year, Contract Number, Contract Name, Vendor Name, Contract Amount, Award Amount, Last Update, and Status. The table contains one row of data:

Program Name	Fiscal Year	Contract Number	Contract Name	Vendor Name	Contract Amount	Award Amount	Last Update	Status
Watershed Program	2005	4600004	Yuba Watershed Assessment, Visioning and Restorati	RJOrg	\$371,000.00	\$371,000.00	11/19/2013	Active

At the bottom, there is a footer with contact information: "For information regarding GRANTS please call (888) 907-4267 or email GRANTSadmin@water.ca.gov."

Click **View All Contracts** and then **Filter**, to see all Contracts for that organization. You can also filter by DWR Program and Year.

Click on the hyperlinked **Contract Number** to display the details of the Contract.

The **Contract Workbook** is displayed with the details of your contract with DWR. Most data will be view only. If you see any errors or items that need to be changed, please contact your DWR contract manager.

Home
PSPs
Projects
Contracts
Organization Admin

My Contracts

Contract Overview
Budget
Amendment
Project
Contract Team
Communication
Attachment
Invoice
Return

Contract Data

Program Name: Watershed Program
Contract Name: Yuba Watershed Assessment, Visioning and Restorati (4600004)

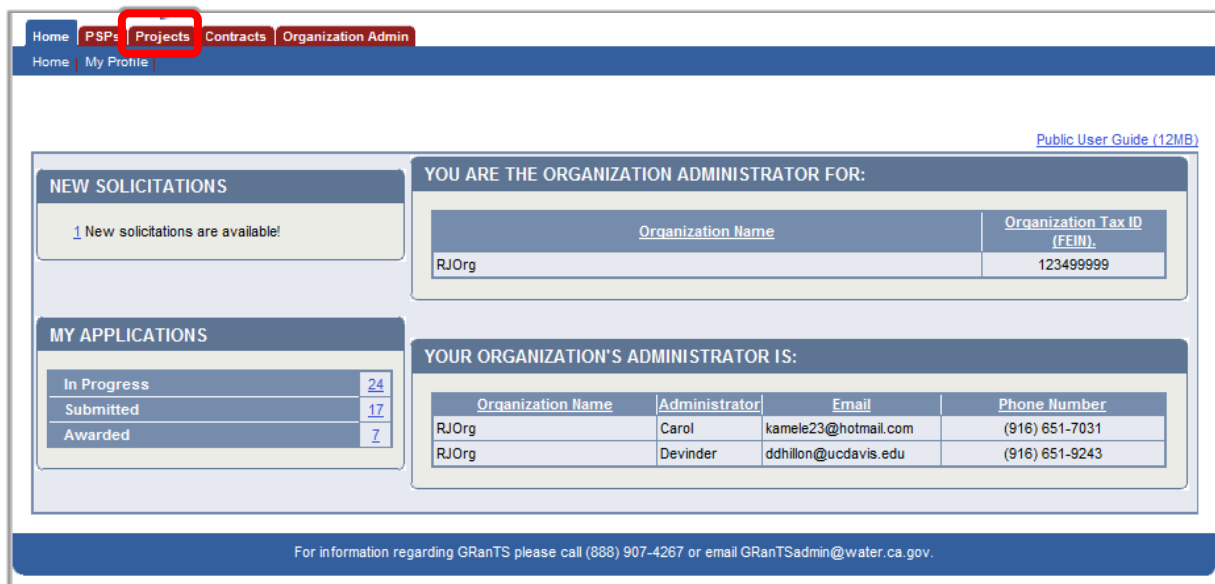
Contract Number:	4600004 *	Contract Name:	Yuba Watershed Assessment, Visioning & *
Program:	Watershed Program *	Fiscal Year:	2005
		Organization Name:	RJOrg *
Description:	The project aims to increase local capacity for watershed	Contract Status:	Active *
Project Manager:	Venukanthan, Kana *	Organization Mgr:	Dhillon, Devinder ddhillon@ucdavis.edu
Start Date:	- Select a date -	End Date:	- Select a date -
Award Date:	6/15/2006	Award Amount:	\$371,000.00
Award Type:	Fixed Price	Award Category:	Grant
Contract Amount:	\$371,000.00		
Retention Percentage:	88 %	Retention Cap:	\$0.00
Current Retention:	\$0.00		

Save
Cancel
Amend

For information regarding GRanTS please call (888) 907-4267 or email GRanTSadmin@water.ca.gov.

X. Viewing Projects

Select the **Projects** tab on the **Home** page.



The screenshot shows the Home page of the GRANTS system. The 'Projects' tab is highlighted in red in the top navigation bar. Below the navigation bar, there are several sections:

- NEW SOLICITATIONS:** A box indicating '1 New solicitations are available!'.
- MY APPLICATIONS:** A table showing the status of applications:

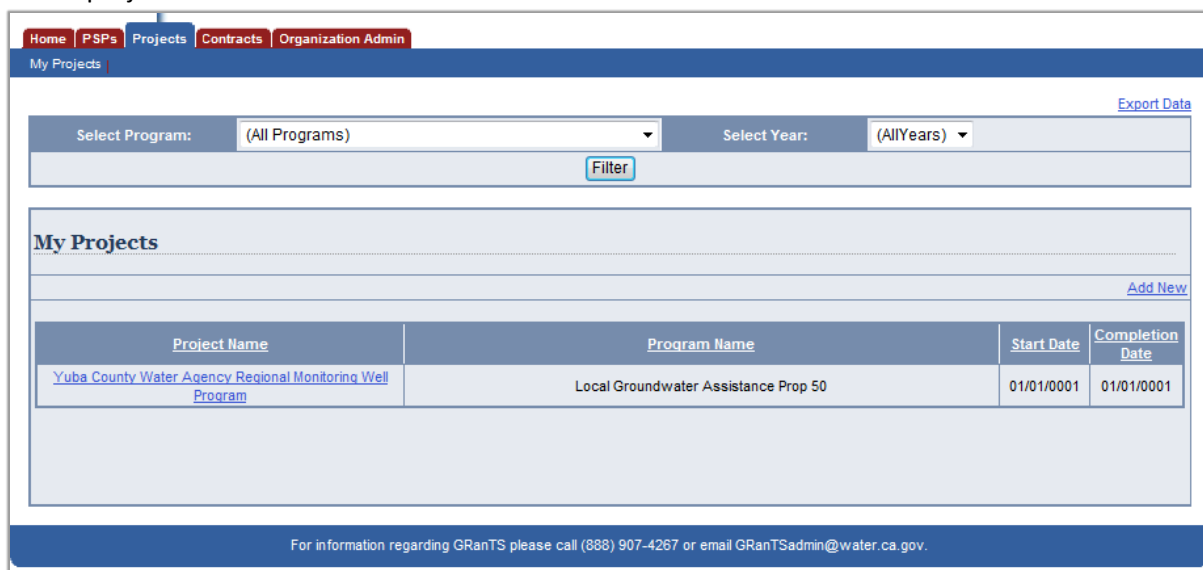
Status	Count
In Progress	24
Submitted	17
Awarded	7
- YOU ARE THE ORGANIZATION ADMINISTRATOR FOR:** A table showing organization details:

Organization Name	Organization Tax ID (FEIN)
RJOrg	123499999
- YOUR ORGANIZATION'S ADMINISTRATOR IS:** A table showing administrator details:

Organization Name	Administrator	Email	Phone Number
RJOrg	Carol	kamele23@hotmail.com	(916) 651-7031
RJOrg	Devinder	ddhillon@ucdavis.edu	(916) 651-9243

At the bottom, there is a footer with contact information: 'For information regarding GRANTS please call (888) 907-4267 or email GRANTSadmin@water.ca.gov.'

The **My Projects** page will be displayed. This page shows all of the projects for which you are listed as a part of the project team.



The screenshot shows the 'My Projects' page. At the top, there is a navigation bar with the 'Projects' tab selected. Below the navigation bar, there is a section for filtering projects:

- Select Program:** A dropdown menu set to '(All Programs)'.
- Select Year:** A dropdown menu set to '(All Years)'.
- Filter:** A button to apply the filters.

Below the filter section, there is a table titled 'My Projects' showing a list of projects:

Project Name	Program Name	Start Date	Completion Date
Yuba County Water Agency Regional Monitoring Well Program	Local Groundwater Assistance Prop 50	01/01/0001	01/01/0001

At the bottom, there is a footer with contact information: 'For information regarding GRANTS please call (888) 907-4267 or email GRANTSadmin@water.ca.gov.'

In the **Projects Workbook** you can see the details of your projects under contract with DWR. If you see any errors or items that need to be changed, please contact your DWR project manager.

Home	PSPs	Projects	Contracts	Organization Admin
----------------------	----------------------	--------------------------	---------------------------	------------------------------------

My Projects

Project Overview	Location	Budget	Milestone	Task	Benefit	Project Team	Communication	Attachment	Checklist	Contract	Return
----------------------------------	--------------------------	------------------------	---------------------------	----------------------	-------------------------	------------------------------	-------------------------------	----------------------------	---------------------------	--------------------------	------------------------

Project Data

Program Name: Local Groundwater Assistance Prop 50
Project Name: Yuba County Water Agency Regional Monitoring Well Program (BMS00053)

Project Name:	Yuba County Water Agency Regional Monitoring Well Progra *	Program:	Local Groundwater Assistance Prop : *
Primary Implementing Organization:	Yuba County Water Agency *	Secondary Implementing Organization:	
Project Status:	Completed And Fully Paid * <input type="checkbox"/> Reportable	I/O Group Code	BMS00053
Project Web Site:		Water Code Citation(Url):	
Approval Date:	- Select a date -	Start Date:	- Select a date -
Scope of Work:		Project Objective:	
Initial		Final	
Project Cost:	\$246,246.00	Project Cost:	\$246,246.00
End Date:	- Select a date -	End Date:	- Select a date -
Description:	Install six dedicated monitoring wells to supplement its existing well network and	Description:	Installed five dedicated monitoring wells to better
Fund Type:	..Select Fund Type..		

For information regarding GRanTS please call (888) 907-4267 or email GRanTSadmin@water.ca.gov.

XI. Communications and Attachments

In the Contract, Project, Invoice, and PSP modules you will find **Communications** and **Attachments** tools. These tools have been created as a place to store critical information and documents regarding the Proposal, Contract, Project, or Invoice with which the communication or attachment is associated. All communications and attachments are visible to DWR staff assigned to the Project, Contract, or Proposal. There is an upload feature within the **Communications** tool to provide for attachments as well. In the **PSPs** module, for example, click on the **My Communications** submenu tab and the **My Communications** page will be displayed.

My Communications

Select Organization: Select Proposal:

[Add New](#)

Date	Proposal Name	Organization	Communications	Author	Attachments
03/29/2011	Test 20121	RJOrg	ask	rjaya@gmail.coM	No Attachments
04/01/2011	WATERSHED RJ APR11 PROP1	RJOrg	contractors will be visiting the site now and then and so need the access	rjaya@gmail.coM	Attachments
08/01/2013	Water Proposal for Water PSP	RJOrg	test	ddhillon@ucdavis.edu	No Attachments
08/01/2013	Water Proposal for Water PSP	RJOrg	test	ddhillon@ucdavis.edu	No Attachments
08/01/2013	Water Proposal for Water PSP	RJOrg	test	ddhillon@ucdavis.edu	No Attachments
08/01/2013	Water Proposal for Water PSP	RJOrg	test1	ddhillon@ucdavis.edu	No Attachments
08/01/2013	Water Proposal for Water PSP	RJOrg	test1	ddhillon@ucdavis.edu	No Attachments

Each entry on this page has the following details: **Date**, **Proposal Name**, **Organization**, **Communications**, **Author**, and **Attachments**. An **Add New** hyperlink is also displayed to add new communications on the **My Communications** page.

New Communication

Select Organization: *

Select Proposal: *

Select Note Type: *

Communication Note:

Attachments:

File

No uploaded files

XII. Working with Invoices

The **Invoice** tab of the contract workbook enables a public user to:

- Prepare an Invoice for a Contract
- Save an Invoice for completion at a later time
- Submit an Invoice for a Contract
- Add/edit Attachment(s) for an Invoice
- Add/edit Communication Note(s) for an Invoice

The invoice feature in GRANTS allows for task level tracking of Bond expenditures throughout the life of the contract. The following process describes the general use of the system.

Select the **Contracts** Module tab from the **Home Page**.

The screenshot shows the GRANTS system Home Page. The top navigation bar includes tabs for Home, PSPs, Projects, **Contracts** (highlighted with a red box), and Organization Admin. Below the navigation bar, the page is divided into several sections:

- NEW SOLICITATIONS**: A box indicating "1 New solicitations are available!"
- MY APPLICATIONS**: A table showing the status of applications:

Status	Count
In Progress	24
Submitted	17
Awarded	7
- YOU ARE THE ORGANIZATION ADMINISTRATOR FOR:** A table showing the organization's details:

Organization Name	Organization Tax ID (FEIN)
RJOrg	123499999
- YOUR ORGANIZATION'S ADMINISTRATOR IS:** A table showing the organization's administrators:

Organization Name	Administrator	Email	Phone Number
RJOrg	Carol	kamele23@hotmail.com	(916) 651-7031
RJOrg	Devinder	ddhillon@ucdavis.edu	(916) 651-9243

At the bottom of the page, a footer bar contains the text: "For information regarding GRANTS please call (888) 907-4267 or email GRANTSadmin@water.ca.gov."

Under the **Contracts** Module tab, select the **My Contracts** sub-module.

The screenshot shows the 'My Contracts' sub-module selected in the top navigation bar. The page title is 'My Contract List'. Below the title, there are two dropdown menus: 'Select Program:' set to '(All Programs)' and 'Select Year:' set to '(AllYears)'. A checkbox labeled 'View All Contracts' is present, and a 'Filter' button is below it. An 'Export Data' link is in the top right. Below these controls is a table with contract details. The table has columns: Program Name, Fiscal Year, Contract Number, Contract Name, Vendor Name, Contract Amount, Award Amount, Last Update, and Status. One contract is listed: Watershed Program, 2005, 4600004, Yuba Watershed Assessment, Visioning and Restorati, RJOrg, \$371,000.00, \$371,000.00, 11/19/2013, Active. An 'Add New' link is in the top right of the table area. At the bottom, there is contact information for GRanTS.

Program Name	Fiscal Year	Contract Number	Contract Name	Vendor Name	Contract Amount	Award Amount	Last Update	Status
Watershed Program	2005	4600004	Yuba Watershed Assessment, Visioning and Restorati	RJOrg	\$371,000.00	\$371,000.00	11/19/2013	Active

For information regarding GRanTS please call (888) 907-4267 or email GRanTSadmin@water.ca.gov.

On the **My Contracts** page, select a Program from the **Select Program** dropdown field. Next, select a fiscal year from the **Select Year** dropdown field. To view your organization's completed or closed out contracts, select the **View All Contracts** option. Click on the **Filter** button once you have made your selections.

This screenshot is identical to the previous one, but with a red rectangle highlighting the 'Select Program:' and 'Select Year:' dropdowns, the 'View All Contracts' checkbox, and the 'Filter' button.

The Active contracts being managed by your agency will also be listed on this screen. Click on the hyperlinked number under the column **Contract Number** to open the details of the selected contract.

This screenshot is identical to the previous ones, but with a red rectangle highlighting the 'Contract Number' '4600004' in the table row, indicating it is a hyperlink.

The **Invoice** workbook tab is found in the submenu for the Contracts Module. Use this tab to access Invoice information.

Contract Data

Program Name: Watershed Program
Contract Name: Yuba Watershed Assessment, Visioning and Restoration (4600004)

Contract Number:	4600004 *	Contract Name:	Yuba Watershed Assessment, Visioning and Restoration *
Program:	Watershed Program *	Fiscal Year:	2005
		Organization Name:	RJOrg *
Description:	The project aims to increase local capacity for watershed	Contract Status:	Active *
Project Manager:	Venukathan, Kana *	Organization Mgr:	Dhillon, Devinder ddhillon@ucdavis.edu
Start Date:	- Select a date -	End Date:	- Select a date -
Award Date:	6/15/2006	Award Amount:	\$371,000.00
Award Type:	Fixed Price	Award Category:	Grant
Contract Amount:	\$371,000.00		
Retention Percentage:	88 %	Retention Cap:	\$0.00
Current Retention:	\$0.00		

Save Cancel Amend

For information regarding GRANTS please call (888) 907-4267 or email GRANTSadmin@water.ca.gov.

GRANTS is designed to save the invoice data for both the Grantee and DWR project managers to access.

Invoice List

Program Name: Watershed Program
Contract Name: Yuba Watershed Assessment, Visioning and Restoration (4600004)

[Add New](#)

Number	Date	Start Date	End Date	Amount	Status	Submitted On
Pending	1/1/2010	1/1/2009	1/1/2010	\$0.00	In Preparation	
Pending	8/1/2013	8/1/2013	8/30/2013	\$2.00	In Preparation	
Pending	8/2/2013	8/2/2013	8/9/2013	\$0.00	In Preparation	
1	8/2/2013	8/4/2013	8/9/2013	\$1.00	Submitted	8/5/2013
Pending	10/1/2013	10/16/2013	10/25/2013	\$1,000.00	In Preparation	

For information regarding GRANTS please call (888) 907-4267 or email GRANTSadmin@water.ca.gov.

The invoice numbers, dates, period of work being billed, amount billed, status, and date submitted are listed in a column format.

To see the details of an Invoice in this list, click on the **Invoice Number** hyperlink.

Home PSPs Projects Contracts Organization Admin

My Contracts

Contract Overview Budget Amendment Project Contract Team Communication Attachment Invoice Return

Invoice List

Program Name: Watershed Program
Contract Name: Yuba Watershed Assessment, Visioning and Restorati (4600004)

[Add New](#)

Number	Date	Start Date	End Date	Amount	Status	Submitted On
Pending	1/1/2010	1/1/2009	1/1/2010	\$0.00	In Preparation	
Pending	8/1/2013	8/1/2013	8/30/2013	\$2.00	In Preparation	
Pending	8/2/2013	8/2/2013	8/9/2013	\$0.00	In Preparation	
1	8/2/2013	8/4/2013	8/9/2013	\$1.00	Submitted	8/5/2013
Pending	10/1/2013	10/16/2013	10/25/2013	\$1,000.00	In Preparation	

For information regarding GRanTS please call (888) 907-4267 or email GRanTSadmin@water.ca.gov.

A. Preparing an Invoice for a Contract

To add a new Invoice, click on the **Add New** hyperlink displayed above the Invoice List on the **Invoices** workbook tab.

Home PSPs Projects Contracts Organization Admin

My Contracts

Contract Overview Budget Amendment Project Contract Team Communication Attachment Invoice Return

Invoice List

Program Name: Watershed Program
Contract Name: Yuba Watershed Assessment, Visioning and Restorati (4600004)

[Add New](#)

Number	Date	Start Date	End Date	Amount	Status	Submitted On
Pending	1/1/2010	1/1/2009	1/1/2010	\$0.00	In Preparation	
Pending	8/1/2013	8/1/2013	8/30/2013	\$2.00	In Preparation	
Pending	8/2/2013	8/2/2013	8/9/2013	\$0.00	In Preparation	
1	8/2/2013	8/4/2013	8/9/2013	\$1.00	Submitted	8/5/2013
Pending	10/1/2013	10/16/2013	10/25/2013	\$1,000.00	In Preparation	

For information regarding GRanTS please call (888) 907-4267 or email GRanTSadmin@water.ca.gov.

Complete the **Invoice Date** and **Period** information. Click on the **Add New Line Item** hyperlink to begin entering Invoice data.

Home | PSPs | Projects | Contracts | Organization Admin

My Contracts


Invoice | Attachments | Communications

Invoice


Print Preview | Return


Agreement Number	4600004		
Vendor Name	RJOrg	Contact Name	Devinder Dhillon
Address Line 1	1212	Contact Email	ddhillon@ucdavis.edu
Address Line 2		Contact Phone	(916) 651-9243
City	Atlanta	Contact Fax	9166519444
State	Georgia		
Zip	95610		

Invoice Number:

Invoice Date:  *

Invoice Period

From:  *

To:  *

[Add New Line Item](#) Total Contract Amount paid to date :

Signature of Organization's Authorized Representative		Date	
Printed Name of Organization's Authorized Representative		Title	
Signature of DWR Manager Approval		Date	
Service Entry Sheet Number			

Save | Submit | Cancel

For information regarding GRanTS please call (888) 907-4267 or email GRanTSadmin@water.ca.gov.

The following image shows the fields that auto-populate and those that are calculated manually. Most Programs encourage grantees/contractors to track expenditures by task in a spreadsheet tool. The information provided by this screen is easily transferred into spreadsheet form while the calculations are kept separate.

Select a Project from the **Project Name** dropdown list of Projects associated with the Contract.

The **Task No. and Description** dropdown menu will be populated with Tasks associated with the Project.

Select a **Task** from the **Task No. and Description** dropdown menu. Specify values for the following fields:

- Current Invoice Amount
- Local Cost Share
- Federal Cost Share
- Other Cost Share
- Org providing Other Cost Share
- Remaining Cost Share to be Spend
- Remaining Budget
- Comments

Click on the **Save** button displayed at the bottom of the **Invoice Line Item** page. Click on the **Return** button displayed at the top of the **Invoice Line Item** page.

Repeat the steps above, as necessary, to complete the invoice.
Rows can be edited or deleted.

B. Invoice Attachments

The attachment feature in the invoice module enables you to upload supporting documentation for invoices into GRANTS. Click on the **Attachments** tab in the **Invoice Workbook** for a particular Invoice to begin.

The screenshot shows the 'Invoice Workbook' interface. At the top, there are navigation tabs: Home, PSPs, Projects, Contracts, and Organization Admin. Below these, there's a 'My Contracts' section with sub-tabs: Invoice, Attachments (highlighted with a red box), and Communications. The main area is titled 'Invoice' and contains a 'Print Preview' and 'Return' button. Below this is a table with invoice details:

Agreement Number	4600004	Invoice Number:	Pending
Vendor Name	RJOrg	Contact Name	Devinder Dhillon
Address Line 1	1212	Contact Email	ddhillon@ucdavis.edu
Address Line 2		Contact Phone	(916) 651-9243
City	Atlanta	Contact Fax	9166519444
State	Georgia		
Zip	95610		

On the right side, there's an 'Invoice Date' field set to 1/1/2010 and an 'Invoice Period' section with 'From' (1/1/2009) and 'To' (1/1/2010) dates.

Click on the **Add New** hyperlink displayed above the Invoice Attachment List on the **Attachments** tab in the **Invoice Workbook**.

The screenshot shows the 'Invoice Attachment List' interface. At the top, there are navigation tabs: Home, PSPs, Projects, Contracts, and Organization Admin. Below these, there's a 'My Contracts' section with sub-tabs: Invoice, Attachments (highlighted with a red box), and Communications. The main area is titled 'Invoice Attachment List' and contains an 'Add New' link (highlighted with a red box) and a message 'No records to Display'.

Be sure to provide a description, select the file type (aka. **Content Type**) by using the dropdown menu and indicate by checking if you want this attachment shared with others on the project team by clicking the private box: **Yes** or **No**. Click on the **Save** button once you're done.

The screenshot shows the 'ADD ATTACHMENT' form. At the top, there are navigation tabs: Home, PSPs, Projects, Contracts, and Organization Admin. Below these, there's a 'My Contracts' section with sub-tabs: Invoice, Attachments (highlighted with a red box), and Communications. The main area is titled 'Invoice Attachment List' and contains an 'Add New' link. Below this is the 'ADD ATTACHMENT' form:

Description:	Attachment #1
Content Type:	Excel
Upload: (File Size Limit :50MB.)	C:\Users\cmesman\De <input type="button" value="Browse..."/>
Private?:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
	<input type="button" value="Save"/> <input type="button" value="Cancel"/>



The **Private?** checkbox: If you check **Yes**, only DWR staff will be able to view this attachment. Checking **No** allows everyone on the contract team to see the attachments. Once saved, attachments cannot be deleted or edited.

Home | PSPs | Projects | Contracts | Organization Admin

My Contracts

Invoice Attachments Communications

Invoice Attachment List

[Add New](#)

ADD ATTACHMENT

Description: Attachment #1

Content Type: Excel

Upload: (File Size Limit :50MB.) C:\Users\lmesman\De [Browse...](#)

Private?: ☐ Yes ☒ No

[Save](#) [Cancel](#)

Message from webpage

Attachments can not be appended or deleted once posted.

[OK](#) [Cancel](#)

Click on the **OK** button, and you will be brought back to the Invoice Attachment List page where an **Attachment saved successfully** verification will appear indicating that the attachment, including its details was saved successfully.

Home | PSPs | Projects | Contracts | Organization Admin

My Contracts

Invoice Attachments Communications

Invoice Attachment List

[Add New](#)

File Name	Description	Type	Author
Test23.xlsx	Attachment #1	Excel	Carol Mesman

Attachment saved successfully.

C. Invoice Communications

Click on the **Communications** tab in the **Invoice** workbook for a particular Invoice.

Home | PSPs | Projects | Contracts | Organization Admin

My Contracts

Invoice Attachments **Communications**

Invoice Attachment List

[Add New](#)

File Name	Description	Type	Author
Test23.xlsx	Attachment #1	Excel	Carol Mesman

Click on the **Create Note** hyperlink below **Invoice Communication List**

The screenshot shows a web application interface with a top navigation bar containing links: Home, PSPs, Projects, Contracts, and Organization Admin. Below this is a 'My Contracts' section with tabs for Invoice, Attachments, and Communications. The 'Invoice Communication List' is displayed, showing a 'Create Note' link highlighted with a red box. Below the link, it states 'No records to Display'.

A note is used to specify the details of Communication entries created on the **Add Communication** interface. It is also possible to upload Attachment(s) for the Communication entry. Click on the **Save** button when you have entered the necessary information.

The screenshot shows the 'Add Communication' form. It includes fields for 'Date of Activity' (11/21/2013), 'Type' (Kick-off Meeting), and a 'Notes' text area. Below the notes is an 'Attachments' section with a 'Description' field, a 'File' input, and buttons for 'Select', 'Remove', 'Add', and 'Delete'. The 'Private?' checkbox is checked, and the 'Save' button is highlighted with a red box. At the bottom, there is an 'ATTACHMENTS' section.



Regarding the **Private?** check box: If you check **Yes**, only DWR staff will be able to view this communication. Checking **No** allows everyone on the contract team to see the note and attachments.

You can see existing communications and their corresponding attachments by clicking the hyperlinked date in the **Invoice Communications List**.

Date	Type	Comments	Attachments	Private	Author
11/21/2013	Kick-off Meeting		Included	Yes	Carol Mesman

D. Submitting an Invoice

Once finalized, the invoice can be printed, signed, and sent with the documentation required by the funding program. Click on the **Submit** button when the invoice is ready to be reviewed and processed by DWR.

Signature of Organization's Authorized Representative		Date	
Printed Name of Organization's Authorized Representative		Title	
Signature of DWR Manager		Date	
Approval			
Service Entry Sheet Number			
<input type="button" value="Save"/> <input type="button" value="Submit"/> <input type="button" value="Cancel"/>			

For information regarding GRanTS please call (888) 907-4267 or email GRanTSadmin@water.ca.gov.

Once your invoice has been submitted, the status will update on the invoice list. An email will be sent to the DWR Contract Manager to notify them that an invoice has been submitted.

Program Name: Watershed Program
Contract Name: Yuba Watershed Assessment, Visioning and Restorati (4600004)

Number	Date	Start Date	End Date	Amount	Status	Submitted On
Pending	1/1/2010	1/1/2009	1/1/2010	\$25.00	In Preparation	
Pending	8/1/2013	8/1/2013	8/30/2013	\$2.00	In Preparation	
Pending	11/5/2013	11/5/2013	3/20/2014	\$0.00	In Preparation	
Pending	8/2/2013	8/2/2013	8/9/2013	\$0.00	In Preparation	
Pending	10/1/2013	10/16/2013	10/25/2013	\$1,000.00	In Preparation	
1	8/2/2013	8/4/2013	8/9/2013	\$1.00	Submitted	8/5/2013

For information regarding GRanTS please call (888) 907-4267 or email GRanTSadmin@water.ca.gov.